

Logging into iPROC

1. Access the IAS web site (<http://ias.usda.gov/>)
2. Click on 'Requisition Module' link
3. Review the USDA Security Agreement and click the **[Accept]** button to continue
4. Enter **Username** and **Password**
5. Click the **[Log On]** button

Finding the Requisition

Requisitions at a Glance

1. Locate the Requisition to be amended under the Requisitions at Glance list
2. If the Requisition is not listed, click the 'More...' link or the *Requisition Status* Tab to view the last 10 requisitions created
3. Click the 'Next' link to view additional requisitions
4. Click the radio button next to the requisition to be amended or click on the **Requisition Number** or **Description** to view the Requisition Details

Amending Prior to Award

The following process is used to amend an un-awarded requisition that does not have a status of Rejected, Cancelled or Pending Change Request.

Adding Additional Line Items or Modify Quantity

1. Click the **[Change]** button
2. Select the **Change and Resubmit** radio button and click the **[Continue]** button
3. Click the 'Return to Shopping' link to add an additional line item if needed
4. Modify the **Quantity** if needed and click the 'Update' link
5. Click the **[Proceed to Checkout]** button

Editing Delivery Information

1. Edit the **Need-By Date** in the following format: DD-MMM-YYYY (e.g. 30-SEP-2006) if needed
2. Edit the **Delivery-To Location** by searching for the Office if needed
3. Click the **[Continue]** button

Editing Billing Information

1. Edit the **Transaction Code** if needed

- IQ-COMMIT – Should be selected when funding is available in the financial system
- IQ-NOCOMMIT – Should be selected when funding is subject to the availability of funds

Editing Charge Accounts

1. Click on the **Charge Account** link to view the account code entered for the line item
2. Change the accounting by selecting the **Charge Account** from the **Nickname** drop-down, or edit a segment by entering/searching for the appropriate value for each segment that needs to be changed
3. Click the 'select multiple charge accounts' link to add/edit multiple charge accounts
4. Repeat Step 2 for each Charge Account to be added/edited
5. Enter/edit the **Percent** or **Quantity** to allocate the funding between the Charge Accounts and click the **[OK]** button
6. Select the 'Apply this account to all requisition lines' check box if the update Charge Account(s) apply to all line items
7. Click the **[OK]** button
8. Repeat steps if different Charge Accounts apply to each line item
9. Click the **[Continue]** button

Editing Notes and Attachments

1. Edit the **Requisition Description** if needed
2. Enter the **Note to Buyer** and **Note to Approver**
3. Click 'Add Attachments' if attachments (SOW, Justifications, etc.) need to be included
4. Select the **Attention to** from the drop-down list
5. Enter the **Description** for the Attachment
6. Select appropriate radio button to indicate the **Attachment Type**. If a 'File', click **[Browse]** to search for the file
7. Click the **[Continue]** button

Editing Approver List

1. Click the **[Add Another Approver]** button if additional approver(s) need to be added
2. Select the sequence from the Drop-Down List

3. Search for the Name of the Approver
4. Repeat for any additional Approvers. **Note: The last approver must always be a Budget Approver**

5. Click the **[Continue]** button

Review and Submit Requisition

1. Review all Requisition edits
2. Click the **[Submit]** button

Amending Post Award

1. Select the awarded Requisition to be amended
2. Click the **[Change]** button
3. Edit the **Need-By**, the **Quantity**, or the **Unit Price** for each Line Item to be amended
4. Enter the **Reason** for amendment
5. Click the **[Next]** button
6. Edit the **Approver List** and enter a **Note to Approver** if needed
7. Click the **[Next]** button
8. Review changes and click the **[Submit]** button

Canceling

Requisitions that have resulted in a commitment in FFIS, MUST BE CANCELLED BY THE BUDGET APPROVER

1. Select the Requisition to be canceled
2. Click the **[Cancel]** button
3. Click the check box under the **Cancel Line** column next to the Line Items to be canceled and click the **[Continue]** button, or click the **[Cancel Entire Requisition]** button to cancel all line items
4. Review the selected Line Items to be canceled and click the **[Submit]** button

Resubmitting

A Requisition must be 'Resubmitted' if it has been Rejected

1. Select the Rejected Requisition to be resubmitted
2. Click the **[Resubmit]** button
3. Follow the steps from **Amending Prior to Award** beginning with *Adding Additional Line Items or Modify Quantity* – Step 3

Tips and Tricks

Searching via Flashlight

Any field with the Flashlight icon provides a search capability for that field

1. Click on the *Flashlight* icon
2. Select the Search By criteria from the drop-down list
3. Enter the value of the search criteria
4. Use a '%' before and after the value to serve as a wild card / search for variations on the value
5. Click the **[Select]** button next the result that matches

Other User Tips

- The status of the Requisition (In Process, Approved, Rejected, Awarded or Received) impacts whether it can be amended or cancelled
- A Requisitioner can cancel a Requisition if it has not been committed in FFIS. Otherwise, the Budget Approver **MUST** cancel the Requisition
- An awarded Requisition can only be cancelled by the Budget Approver **after the CO cancels the Award.**
- After a payment has been made to the vendor, the Requisition cannot be canceled
- A Requisition that has been receipted but not paid can only be cancelled by the Budget Approver after the items have been returned in IAS and after the CO cancels the Award
- Post Award, only the **Need-By**, the **Quantity**, or the **Unit Price** can be amended on a Requisition
- A Requisition must be 'Resubmitted' if it has been Rejected

Help and Support

IAS Website

Visit <http://ias.usda.gov/> for user guides, procedures/policy documents, release notes, and the latest news on IAS. Also, find Quick Tips and FAQs

Help Desk

IAS Help Desk is the first line of support for IAS Users. All issues encountered need to be logged with the IAS Help Desk to facilitate tracking and resolution. IAS Help Desk addresses User functional and technical issues and provides an avenue for User enhancement and system change requests

- Help Desk personnel are available from 8 AM – 8 PM Eastern Standard Time Monday through Friday
- IAS Users can log and create their Help Desk tickets through the following channels 24 hours a day:
 - Internet: <http://www.iashelpdesk.com/request.htm>
 - E-mail: support@iashelpdesk.com
 - Telephone: 1-866-IAS-8686 (Voice mail after hours)

Amending a Requisition



IAS Quick Reference Guide